European Monitoring Centre for Drugs and Drug Addiction

EMCDDA trendspotter briefing

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Illicit drug markets and supply in the Western Balkans: Impact of COVID-19

The situation regarding the COVID-19 pandemic and responses to it continues to evolve rapidly. Regular updates are provided by the European Centre for Disease Prevention and Control and the World Health Organization, and in most countries national public health guidelines are available. The EMCDDA has created a COVID-19 resource hub that provides access to up-to-date materials on drugs and COVID-19-related issues.

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Summary

Since the beginning of 2020, the world has been experiencing an unprecedented public health emergency caused by the SARS-CoV-2 (COVID-19) pandemic. In response, a range of measures have been introduced to protect public health and reduce the risk of infection, including restrictions on social contact and travel.

The Western Balkans reported their first COVID-19 infection cases later than most of the EU Member States. Despite this, their containment strategies have generally been implemented in a similar way and at the same time as in other parts of Europe.

To improve understanding of the impact of the pandemic and associated measures on the drug market in the Western Balkans, the EMCDDA initiated a study using its trendspotter methodology (EMCDDA, 2018). The available information is rather limited. The conclusions reported here are primarily based on law enforcement experts' opinions and should be regarded as preliminary and will require confirmation as more information becomes available. Nonetheless, they do represent a first rapid assessment. Preliminary findings from this exercise suggest the following.

- Based on the available evidence, organised crime groups (OCGs) in the region appear to have been resilient to disruption to their business models due to COVID-19 restrictions.
    - However, adaptations to their modi operandi were observed to mitigate the impact of COVID-19 restrictions. These include greater use of secure communication channels and changes to drug transportation modes and trafficking routes.
    - The lifting of COVID-19-related restrictions (e.g. partial opening of borders) has seen the rapid return to more established trafficking methods.
    - All main types of drugs appear to have remained available on the illicit market, although drug distribution methods at retail level changed to respond to restrictions on movement and greater risk of arrest.
- Overall, business models may have been adapted to respond to COVID-19 restrictions but no significant disruption was observed in illicit cannabis production in the region.
- Adaptations to business practices during restrictions are reported to have had an impact on operations at all market levels (production, trafficking and local distribution). A possible knock-on effect of these adaptations is that drug transportation costs and drug wholesale prices seem to have increased significantly during this period.
- The air passenger travel ban had an immediate impact on cross-border transportation. As the use of air couriers became more difficult, there were signs of more activity in exploiting commercial vehicles and road transportation, although the size of individual drug shipments appears to have decreased.
- Some of the main routes for herbal cannabis trafficking from the Western Balkans to other European destinations seem to have remained in use despite restrictions. For example, OCGs appear to have continued to organise the transportation of large quantities of herbal cannabis to Italy using speed boats. No new routes were identified through this study.

- No recent large seizures of heroin were reported by the study's participants. However, the impression remained that the Western Balkan region was continuing to play a role in heroin transit on the Balkan route. Volumes may have fallen during periods when restrictions were in place.
- Overall, the study demonstrates that drug markets can adapt rapidly to mitigate possible threats to their business model resulting from COVID-19 restrictions. The current situation therefore remains very dynamic and requires regular review if responses are to keep track of developments.

Introduction

Since the beginning of 2020, the world has been experiencing an unprecedented public health emergency caused by the SARS-CoV-2 (COVID-19) pandemic. In response, a range of measures have been introduced to protect public health and reduce the risk of infection. These have had a direct or indirect impact on all areas of life, including the operation of the drug market.

The EMCDDA cooperates with candidate countries and potential candidates to the European Union (EU) through technical cooperation projects financed by the Instrument for Pre-accession Assistance (IPA) of the European Commission. This study was supported by IPA7, a technical cooperation project launched in July 2019 with six beneficiary countries: Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia, and Serbia.

Reported here are the findings of a rapid multidisciplinary expert opinion study to review the possible impact of COVID-19 on the operation of the drug market. The current situation is extremely dynamic. The findings of the study should be interpreted with caution as they are based substantially on expert opinions gathered from law enforcement sources between September and October 2020, when the research was conducted. In general, very limited statistical or research data is available in the Western Balkan region on drug markets during this period. Therefore, the conclusions are necessarily preliminary and will require review as more data sources become available.

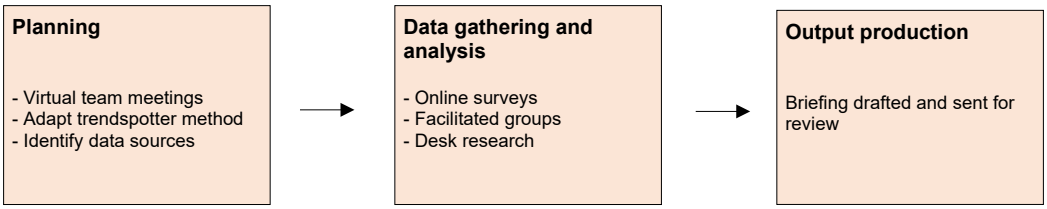
The content of this study does not reflect the official opinion of the IPA7 countries.

Trendspotter methodology

The trendspotter methodology is a structured rapid assessment approach, triangulating information from a range of qualitative and quantitative sources, including expert opinion (EMCDDA, 2018). The method has been adapted to be administered remotely to investigate the impact of COVID-19 on drug use and drug markets during the current crisis (EMCDDA, 2020) (Figure 1).

* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

FIGURE 1
Adapted trendspotter methodology



The data sources used here are:

- a review of the international literature and open-source monitoring;
- a targeted online survey disseminated among law enforcement experts (police and customs) from IPA7 partners and to national drug observatories, IPA7 national correspondents and other appropriate experts ([1]);
- information collected during two online facilitated focus groups comprising of 12 experts from Police and Customs authorities from all IPA7 participating countries.

In this report, citations are provided for results based on literature and online sources that are in the public domain. The other findings are based on the online survey responses or facilitated group discussions. Some of the observations reported here are informed by intelligence or other information not in the public domain.

Context: National responses to the COVID-19 outbreak

The global fast-evolving COVID-19 pandemic in 2020 led to the implementation of extraordinary, unprecedented containment measures to stop the spread of coronavirus. To date, the most common measures have been border closures, restrictions on the movement of people, physical distancing, prohibited public gatherings, closed restaurants and shops, and school shutdowns. The situation is extremely dynamic with countries needing to regularly review and adapt the severity of measures, depending on infection rates within their population. In general terms, this has led to periods of more severe 'lockdowns' followed by periods in which restrictions have been eased to varying degrees.

Figure 2 summarises key dates in the response to the first registered COVID-19 case in each of the IPA7 partners. Among these countries, the first confirmed COVID-19 case was reported on 26 February in North Macedonia. The last country to report its first confirmed case was Montenegro on 17 March (IMF, 2020). The governments reacted swiftly and imposed a number of restrictive measures in March.

([1]) Sixteen responses were received from Albania (3), Bosnia and Herzegovina (6), Kosovo (1), Montenegro (1), North Macedonia (1) and Serbia (4).

FIGURE 2
Introduction of COVID-19-related national confinement measures, 2020

The main observations in drug markets

Drug production — marginal impact observable

The information available at the time of the study (September to October 2020) suggested that, in general, restrictions related to the COVID-19 pandemic had not significantly affected illicit drug production in the region.

Despite supply reduction, the Western Balkans appear to remain an important source of cannabis for some parts of the EU. Cannabis is known to be trafficked mainly by vessels crossing the Adriatic Sea to Italy or by land along the Balkan route (EMCDDA and Europol, 2019).

Some OCGs in the region may have seen the COVID-19 pandemic as an opportunity to increase cannabis production, as law enforcement efforts were redirected to prioritise the enforcement of restrictions related to COVID-19 control. It is suggested that this mainly occurred in more inaccessible areas. Notably, authorities in Albania continued to implement specific measures against cannabis cultivation during the lockdown. However, the information available at the time of the study suggests that a slight increase of cannabis production was registered during the lockdown. Importantly, the preliminary data indicate that more herbal cannabis was seized, despite any possible temporary reprioritising of law enforcement efforts. However, this does not necessarily imply that production increased. These inferences may need to be revised when more information becomes available.

The COVID-19 pandemic may have caused some OCGs to move away from importing cannabis from neighbouring countries and focus more on domestic production. For example, as the border with Albania has been closed, it was suggested that some OCGs from Kosovo started to produce cannabis in areas close to the Albanian border. It is unclear what evidence supports this suggestion but this possibility merits further investigation.

It was suggested that technological innovation for indoor cultivation has continued to be slowly introduced, resulting in the potential to increase production efficiency and enhance the potency of the final product. However, this appears to be a longer-term trend rather than one driven by the current pandemic. The study did not find any evidence of an increase in large-scale indoor cultivation as a method of drug production. Cannabis cultivation in the Western Balkans still occurs mainly outdoors, with crops concealed by being located in remote mountain or forested areas. Indoor cultivation currently is thought to account for only a small share of overall production volumes. However, a few relatively sophisticated indoor production sites have been dismantled recently. For instance, at the end of March, a relatively well-equipped cannabis production facility was dismantled by the Serbian Police (Ministry of Interior of Serbia, 2020a) (see box on indoor cannabis production below).

Indoor cannabis production

An illegal facility for the production of cannabis was discovered in the area of Nova Crnja, Serbia (March 2020). Police seized 141 cannabis plants with a total weight of about 6.5 kilograms at a cultivation site equipped with lamps, fans, transformers and timers.

Photo source: Ministry of Interior of Serbia (2020a)

Therefore, this remains an area that requires continued vigilance.

The Western Balkan region is not thought to be a major player in synthetic drug production. However, amphetamine is produced in the region and some facilities have been dismantled in the last few years. The experts reported that small-scale facilities have been identified and dismantled during the analysed period. There was no other evidence to suggest any significant disruption at this time related to the current pandemic.

Similarly, there were no reports that the availability and price of precursor chemicals had been impacted by the COVID-19 situation. If this is correct, it could indicate that stockpiles existed or that cross-border smuggling continued. In this context, shortly after the implementation of stricter COVID-19 control measures, Serbian law enforcement seized a shipment that included 3 litres of amphetamine base oil and 30 kilograms of adulterants (Ministry of Interior of Serbia, 2020b).

Cross-border trafficking: smaller shipments and changes in transportation methods

Due in part to its geographical location, the Western Balkan region is known to be a transit area for heroin, cocaine, synthetic drugs and some precursors.

The road transport restrictions and the air passenger travel ban appear to have led to immediate adaptation in the methods OCGs use for cross-border transportation of drugs. There are reports of a significant increase in exploiting trucks transporting licit commercial goods. At the same time, the use of air couriers was heavily curtailed. Consequently, there was a reported increase in the recruitment of truck drivers in smuggling operations. This may have implications for the future.

Some of the established herbal cannabis trafficking routes from the Western Balkans to neighbouring countries and the EU seem to have remained active during the lockdown period, as indicated by the seizures made by law enforcement from Albania, Montenegro, North Macedonia and Italy (Syri.net news, 2020; Ministry of Interior of Montenegro, 2020; Ministry of Interior of North Macedonia, 2020a; Guardia di Finanza of Italy, 2020) (see box on operational results obtained during the pandemic below).

Some operational results obtained during the pandemic

- On Lake Skadar, Montenegro (March), 150 kg of herbal cannabis were seized during Operation Panther. This operation dismantled an OCG smuggling cannabis from Albania to Montenegro by boat over Lake Skadar for further distribution to neighbouring countries and the EU.
- In the north-western part of Albania (March), 613 kg of herbal cannabis were seized during Operation Godull. The drugs had been prepared for cross-border trafficking by boat.
- In Butel, Skopje, North Macedonia (April), 1 240 kg of herbal cannabis were seized. The investigation suggests that the drugs may have been produced locally.
- in Serbia (March), 9 kg of cocaine, 4.2 kg of amphetamine, 3 litres of amphetamine base oil, 6.4 kg of herbal cannabis and about 30 kg of adulterants were seized from a multinational OCG involved in polydrug trafficking, which was dismantled following a European joint investigation.

No new trafficking routes were identified through this study. OCGs seem to have continued to smuggle drugs through open border crossing points (BCPs) and green/blue borders ([2]), but the size of individual drug shipments appears to have decreased.

The difficulty in arranging in-person meetings between OCGs leaders may have caused problems in negotiating the transportation of large shipments. In addition, the restrictions may have made moving money riskier than in the past (Kemp, 2020). However, other information suggests that some OCG operations were not affected seriously or adversely. For example, the available information indicates that Montenegro experienced an increase in cannabis trafficking during the lockdown period, with smuggling operations increasingly concentrated in the area of Lake Skadar on the border between

([2]) Green and blue borders refer to the land and sea boundaries between officially recognised border crossing points (BCPs) on major roads and rail lines or at seaports where all legitimate crossings should take place (Frontex, 2015).

Albania and Montenegro. Similarly, herbal cannabis has been seized on Lake Ohrid situated between Albania and North Macedonia.

The information available suggests that routes through remote mountain areas that are difficult to patrol have remained in use, with smaller quantities transported on the backs of animals. It was reported that unofficial roads between Albania and Kosovo were used more intensively during the period when official BCPs were closed. Respondents to this study also reported that cannabis has continued to be trafficked from the Western Balkans to Turkey.

The information suggests that the street price for herbal cannabis in the region has not been significantly impacted by COVID-19 restrictions. Wholesale prices are reported to have increased considerably, as has the cost of cross-border trafficking of wholesale quantities. This may reflect the reduced opportunities for trafficking and correspondingly higher risks run by couriers in attempting border crossing. For example, sources suggest that the cost of trafficking cannabis from Albania to Turkey has increased to almost EUR 1 000 per kilo.

Seizures of cannabis recorded in Italy also support the assessment that OCGs maintained the capacity to smuggle this drug by speed boat across the Adriatic Sea during this period. At the end of April, Italian authorities arrested two Italian nationals smuggling 900 kg of drugs (646 kg of herbal cannabis and 250 kg of cannabis resin) from the Western Balkans using two boats equipped with powerful outboard engines. The load was divided into 54 packages, each split into packs of 2, 5 and 10 kg and marked with codes indicating the production area, the type of drug and the recipients in Italy (Guardia di Finanza, 2020).

In the early stages of the COVID-19 crisis, it was reported that global opium poppy harvests had not been affected by the pandemic (Eligh, 2020). However, an assessment published by the United Nations Office on Drugs and Crime (UNODC) around the same time indicated that the overall impact of the pandemic was not yet clear (UNODC, 2020). In March 2021, UNODC published data suggesting that the trafficking of heroin from Afghanistan to Europe had not been affected by the COVID-19 pandemic (UNODC, 2021).

Heroin production and the trafficking of opiates along most established routes seems to have continued during this period (EMCDDA and Europol, 2020). Law enforcement experts indicated that the Western Balkan region seems to have continued to play a role in the transit of heroin on the Balkan route. However, large seizures were not reported by most study participants. An exception appears to be Albania, where information suggests a slight increase in the quantities of heroin seized. It is difficult to draw any strong conclusions on this issue: some heroin trafficking seems to have continued during the period when COVID-19 restrictions were in place. It is possible that smaller volumes were moved but this assertion cannot be made with any great certainty.

At international level, the trafficking of cocaine using maritime shipping containers appears to have continued relatively unimpeded by the current pandemic, while trafficking by air passengers dramatically decreased (EMCDDA and Europol, 2020). It is difficult to comment on developments in relation to cocaine and the countries covered by this study. Some nationals of the Western Balkans may have been involved in international cocaine trafficking during this period. For example, at the beginning of May, 500 kg of cocaine were seized from a ship registered in Montenegro that had sailed from Brazil via the United Kingdom to the Port of Hamburg, Germany (Hakirevic, 2020). Montenegro

was the only study participant that reported an increase in the quantity of cocaine seized. These conclusions will need to be reviewed when more complete statistical information is available.

Synthetic drugs appear to have remained available at street level during the lockdown. However, from the reported information it is unclear whether the level of availability changed during this period. It is also unclear whether the demand for some types of synthetic drugs decreased due to closures of the settings in which they are often consumed (festivals, nightclubs, etc). Study participants did not report any noteworthy seizures of synthetic drugs, although some small-volume smuggling of synthetic substances was noted. For instance, the North Macedonian police confiscated 2 000 MDMA tablets in April (Ministry of Interior of North Macedonia, 2020b).

The lifting of COVID-19-related measures appears to have had an immediate impact on cross-border trafficking with some evidence that there was a bounce back to utilising more long-established trafficking methods. For example, in May, shortly after the strictest measures were lifted, 38 kg of heroin transported by truck were seized at the Port of Durrës (Ministry of Interior of Albania, 2020). In the same period, 1 tonne of herbal cannabis was seized near the Albanian-Greek border (Halili, 2020).

Domestic illicit drug markets — adapted to the new conditions

Distribution networks — new models of drug supply

At retail level, the distribution of drugs to consumers in countries in the region mostly relied on face-to-face transactions. There is evidence that these were disrupted by COVID-19 restrictions on social contact and the increased presence of law enforcement officers in public areas.

To overcome restrictions on movement and higher risks of arrest, street dealers were reported to have quickly adopted technological solutions that facilitate contact. For example, the location and time of drug transactions were coordinated by telephone or internet-based chat applications and scheduled to coincide with the times that people were allowed to leave their houses for essential purposes (buying food etc.). This method appears to have been most easily adopted by buyers and sellers who had direct personal contact before the restrictions were introduced. However social media and encrypted communication applications may also have played a more prominent role in initial contact and sourcing of drugs at user level. This issue and its longer-term implications require further research.

To avoid detection and move more freely, drug distributors also appear to have exploited businesses that were allowed to operate during the lockdown, such as food delivery and taxi services. In addition, some betting shops may have been used as locations for conducting drug transactions in Serbia (Djordjević and Dobovšek, 2020).

During lockdown, risks associated with delivering drugs were sometimes mitigated by exploiting vulnerable groups, such as children. This was suggested to be relatively common in Bosnia and Herzegovina and in Serbia (Djordjević and Dobovšek, 2020). It is not clear whether this modus operandi existed before the pandemic. This is another topic that deserves more attention.

To avoid in-person contacts, the drug drop or 'dead drop' technique ([3]) also appears to have gained popularity in some EU countries (EMCDDA and Europol, 2020). However, the available information does not suggest that this method has gained traction in Western Balkans, with only a few cases documented.

Assessments of availability, price, purity/potency

All main types of drugs appear to have been available on the illicit market, although some law enforcement experts reported possible changes in retail levels of availability (see Figure 3). It could be speculated that demand for some recreational drugs decreased due to the closure of clubs and restricted tourism. However, demand may have increased for other substances that are more likely to be used in home settings. This factor needs to be considered in analyses of the data reported here, as both availability and demand for some substances may have decreased. It is difficult to access drug availability but comparing price and potency/purity information over time can be an indicator of changing levels of availability. However, an accurate, timely dataset are required to achieve this, delineated by levels of the market. The available information is more impressionistic and should therefore be regarded as a preliminary assessment.

According to the experts, Albania, Montenegro and Serbia perceived almost no impact of COVID-19 on the availability of drugs, while in Bosnia and Herzegovina a slight decrease in the availability of nearly all drugs was observed. In North Macedonia, the availability of the main drugs was thought to have decreased with the exception of cocaine. Some cocaine initially intended for international distribution may have entered the local market during this period as borders became more difficult to cross. In Kosovo, a slight decrease was observed in the availability of some types of drugs, such as herbal cannabis, cocaine, MDMA and amphetamine.

In Montenegro and Serbia, no change in price or availability was observed, while in North Macedonia a perceived slight decrease in availability coincided with a small increase in price. In Albania, the price of some drugs increased slightly at street level and a significant increase in the wholesale price of herbal cannabis was reported.

Most of the experts noted no change in the purity/potency of drugs. However, the purity of cocaine in Kosovo appears to have decreased, as has the purity of some synthetic drugs. It appears that in Albania a decrease in heroin purity was observed, but no change for other drugs. All these inferences may need to be revised when more information becomes available.

The reduced availability of some drugs appears to have been a temporary effect resulting from the minor disruption of drug markets due to social distancing, total/partial closure of borders and movement restrictions. When the strict COVID-19-related measures were lifted, the situation appears to have reverted to its pre-lockdown state.

([3]) This distribution method involves the buyer transferring funds to the seller, after which the drugs are hidden in a secret place and the coordinates and a description of the hiding place are sent to the buyer to retrieve them (EMCDDA and Europol, 2020).

FIGURE 3
Changes in drug price, availability and purity/potency
Expert opinion: drug retail prices and availability at consumer level

Type of drug	Albania			Bosnia and Herzegovina			North Macedonia			Kosovo			Montenegro			Serbia		
	Availability	Price	Purity / potency	Availability	Price	Purity / potency	Availability	Price	Purity / potency	Availability	Price	Purity / potency	Availability	Price	Purity / potency	Availability	Price	Purity / potency
Cannabis (herb)	—	↑	—	↓	↑↑	—	↓	↑	-	↓	↑	—	—	—	—	—	—	—
Cannabis (resin)	—	↑↑	—	↓	↑	—	↓	↑	-	—	-	-	-	-	-	—	—	—
Cocaine powder	—	—	—	↓	↑↑	—	↑	↑	-	↓	↓	↓	—	—	—	—	—	—
Crack cocaine	—	↑	—	↓	↑↑	—	↓	-	-	↓	-	-	-	-	-	—	—	—
Heroin	—	↑	↓	↓	↑↑	—	↓	↑	-	—	-	↓	—	—	—	—	—	—
MDMA	—	-	-	↓	↑↑	—	↓	↑	-	↓↓	↑	↓	-	-	-	—	—	—
Amphetamine	—	-	-	↓	↑↑	—	↓	↑	-	↓↓	↑	↓	-	-	-	—	—	—
Methamphetamine	—	-	-	↓	↑↑	—	↓	↑	-	—	—	-	-	-	-	—	—	—
New psychoactive substance	—	-	-	↓	↑	—	↓↓	-	-	—	-	-	-	-	-	—	—	—

Source: EMCDDA IPA7 survey and the focus groups meeting

Availability	
No change	—
Slight increase	↑
Slight decrease	↓
Strong decrease	↓↓
Not known	-

Price	
No change	—
Small increase (less than 20 %)	↑
Small decrease (less than 20 %)	↓
Marked increase (more than 20 %)	↑↑
Various replies	↑↓
Not known	-

Purity/potency	
No change	—
Increase	↑
Decrease	↓
Not known	-

Main challenges for law enforcement

Law enforcement authorities have been required to play a role alongside other government and health officials in efforts to contain the spread of COVID-19 and maintain public order during the pandemic. As public servants come into contact with the general public, the risk of COVID-19 infections for law enforcement officials also needed to be assessed, and where possible mitigated.

As observed in some EU Member States (EMCDDA and Europol, 2020), the COVID-19 pandemic has had an impact on the working practices of law enforcement authorities in the Western Balkans. A need to devote more resources to public order policing is likely to have resulted in a temporary reduction in the availability of personnel for investigative duties and/or intelligence work. With less personnel, anti-drug units may have faced challenges to cover all the areas of serious organised crime. However, it was also reported that law enforcement has continued to initiate and participate in national and international drug investigations during the pandemic period. For example, judicial authorities and police in Albania and Italy finalised a joint investigation on a drug trafficking network that led to the seizure of 3.5 tonnes of ‘herbal cannabis, cocaine and cannabis resin’ (Eurojust, 2020).

Some of the restrictive measures also let law enforcement dedicate more time to specific tasks such as border checks, in some cases resulting in an increase in the detection of illicit goods including drugs.

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UNODC (2021), UNODC Drugs Monitoring Platform Brief: *Possible impact of the COVID-19 pandemic on trafficking in opiates and methamphetamine originating in Afghanistan*, Vienna (https://www.unodc.org/documents/data-and-analysis/covid/DMP_Brief_short.pdf).

Resources

EMCDDA

- Topics page on COVID-19 and drugs: http://www.emcdda.europa.eu/topics/COVID-19 Europe
- European Centre for Disease Prevention and Control: https://www.ecdc.europa.eu/en/covid-19-pandemic
- European Commission action and response team: https://ec.europa.eu/info/live-work-travel-eu/health/coronavirus-response_en
- European Science Media Hub (European Parliament): https://sciencemediahub.eu/
- WHO Europe: http://www.euro.who.int/en/home

World

- Center for Disease Control and Prevention: https://www.cdc.gov/coronavirus/2019-nCoV/index.htmland https://www.cdc.gov/coronavirus/2019-ncov/community/homeless-shelters/plan-prepare-respond.html
- WHO: https://www.who.int/emergencies/diseases/novel-coronavirus-2019

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